



SMALL BUSINESS HEALTH OPTIONS PROGRAM
MARKETPLACE

AGENT/BROKER ENROLLMENT USER GUIDE

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The Small Business Health Options Program (SHOP) Marketplace on HealthCare.gov has an Agent/Broker Portal with online enrollment functions. To work with the SHOP Marketplace, all agents and brokers must keep an active SHOP registration. You must complete the SHOP Marketplace Agreement on the Medicare Learning Network, and identity proofing on the Centers for Medicare and Medicaid Services (CMS) Enterprise Portal.

When you complete the Marketplace registration requirements, you'll get a Marketplace User ID that gives you access to the SHOP Agent/Broker Portal on HealthCare.gov. Visit cms.gov/ccio/programs-and-initiatives/health-insurance-marketplaces/a-b-resources.html to complete the registration and training requirements for the SHOP Marketplace.

Helping employers enroll in the SHOP Marketplace

As an Agent or Broker, you should follow the same process as employers to complete a SHOP Marketplace application. You'll be able to do the same things that an employer can do. Follow these steps to help employers enroll. For more detailed enrollment instructions, visit Marketplace.cms.gov/outreach-and-education/enroll-in-shop.pdf. Remember, employers have to give you authorization before you can help them in the SHOP Marketplace.

Create a profile on HealthCare.gov

- **Log in to the Agent/Broker portal.** Visit HealthCare.gov/marketplace/small-businesses/agent and enter your Marketplace User ID and password. Select **LOG IN**.

The screenshot shows the CMS.gov Enterprise Portal interface. At the top, the CMS.gov logo is on the left, and navigation links (Home, About CMS, Newsroom, Archive, Help & FAQs, Email, Print) are on the right. Below the logo, it says "Centers for Medicare & Medicaid Services". There are two yellow buttons: "Health Care Quality Improvement System" and "Provider Resources". The main content area has a blue header "Terms and Conditions". Below this, it displays "OMB No.0938-1236 | Expiration Date: 04/30/2017 | Paperwork Reduction Act". The text states: "You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only." It also mentions that unauthorized use may result in disciplinary action. A section titled "By using this information system, you understand and consent to the following:" lists two points: "You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this information system." and "At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system." Another point states: "Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose." At the bottom, it says: "To continue, you must accept the terms and conditions. If you decline, your login will automatically be cancelled." There are two buttons: "I Accept" and "Decline".

CMS.gov | Enterprise Portal
Centers for Medicare & Medicaid Services

Home | About CMS | Newsroom | Archive | [Help & FAQs](#) | [Email](#) | [Print](#)

Health Care Quality Improvement System | Provider Resources

Welcome to CMS Enterprise Portal

User ID

Password

[Log In](#) [Cancel](#)

[Forgot Password?](#)
[Forgot User ID?](#)
 Need an account? Click the link - [New user registration](#)

HealthCare.gov | Manage clients | Manage enrollments | My account | Get assistance | [Español](#)

[Log out AGENT4TEST0](#)

My Profile

[My Profile](#)
[Messages](#)

You're authorized to work in the Small Business Health Options Program (SHOP) Marketplace.

**Required field.*

Basic information

*First name Middle name *Last name Suffix

Mattie Boyd Suffix

*Email address Agent/broker username

Agent4Test0@yopmail.com AGENT4TEST0

Phone number Ext. Phone type

(555) 600-7777 Home

- **Enter information about you and your agency.** You must keep an active profile on HealthCare.gov to work with the SHOP Marketplace. On the **My Profile** page, enter basic information about you and your agency. All required fields are marked with an asterisk (*). All employers will be able to access this information.

Second phone	Ext.	Phone type	
<input type="text"/>	<input type="text"/>	<input type="text" value="Cell"/>	
Preferred language	Preferred method of contact		
<input type="text" value="Select options"/>	<input type="text" value="Email address"/>		
<hr/>			
Agency information			
*Agency name	Agency website URL		
<input type="text" value="AGENT4TEST0"/>	<input type="text"/>		
Agent/broker address			
*Street address	Apt./Ste. #		
<input type="text" value="4313 CLARNO DR"/>	<input type="text"/>		
*City	*ZIP code	*County	*State
<input type="text" value="Austin"/>	<input type="text" value="78749"/>	<input type="text" value="TRAVIS"/>	<input type="text" value="TX"/>
*Agent/broker Tax Identification Number (TIN)			
<input type="text" value="29-3874982"/>			
Marketplace ID		National Producer Number (NPN)	
<input type="text" value="1418338184252"/>		<input type="text" value="468931"/>	

Marketplace ID	National Producer Number (NPN)
1418338184252	468931
SHOP Agreement status	MLN training status
VALID	VALID
Working hours	
*From (HH:MM)	*To (HH:MM)
08:00	20:00
*Working days	
<input checked="" type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday <input checked="" type="checkbox"/> Sunday	
SAVE & CONTINUE	

Adding a client

You can add clients only after the employer requests an authorization. To add an employer:

- Select the **Manage clients** tab. On the **My clients** page you'll see a list of your clients.
- Select the **Add** link under the **Client status** field. The client's status should be **Prospect**. On the **Edit client** page you'll see the employer details.
- Select **Add** to enter an employer. On the **My clients** page, the client's status will change from **Prospect** to **Client**.



Manage clients

You can add, search, and view client information here.

[DOWNLOAD IN EXCEL](#)

Search

Within

Client name

SEARCH

1 - 10 of 15

Client list

Client name ^	Phone number ^	Company ^	Client status ^	Action
Boyd, Mattie	(333) 444-5555	Boyd and Stuff	Inactive client	Client notes
Carson, John	(601) 856-3063	IssuerTesting_Scenario22	Client	Client notes
Carson, John	(601) 856-3063	John Carson LLC	Client	Client notes
Carson, John	(601) 856-3063	Al-Malik	Client	Client notes
Carson, John	(601) 856-3063		Prospective client Add	Client notes

HealthCare.gov

Manage clientsManage enrollmentsMy accountGet assistance

Español

Log out AGENT4TEST0

My clients

Edit client

BACK TO MANAGE CLIENTS

Status: CLIENT

CHANGE CLIENT STATUS TO INACTIVE

*Required field.

*First name

Middle name

*Last name

Suffix

John

Carson

Suffix

*Business name

123

Primary business address

*Street address

Apt./Ste. #

HealthCare.gov

Manage clientsManage enrollmentsMy accountHelp

Español

Log out KMOCIMPL919

My clients

Manage clients

You can add, search, and view client information here. Use the Download template and Upload Client List to manage your clients.

DOWNLOAD IN EXCEL

Search

Within

Client name

SEARCH

Client list

1 - 1 of 1

Client name	Phone number	Company	Client status	Action
CARSON, JOHN	(601) 856-3063	Rainy day	Client	Client notes

Review client list

In the Agent/Broker Portal, you'll have a list of your existing clients. When you have authorization from an employer, you can make edits to specific employer's information, and sort by client's name, phone number, company name, client type, or client status. You can also add client notes to an employer's account.

Employer's can authorize an agent or broker by clicking on the **Get assistance** tab and searching for a list of agents and brokers registered to work with the SHOP Marketplace by location, your name, or National Producer Number (if available).

To review your list of clients:

- Select the **Manage clients** tab. On the Manage client's screen, select the drop down menu, under the **Employer** tab.
- Select one of these search criteria from the drop down menu:
 - Client name
 - Phone number
 - Company
 - Client type
 - Client status
- Select **Search**. You'll see the employer's information in the search results. If the employer isn't found, you'll see an error message. You can select other search criteria from the drop down menu to try again.

HealthCare.gov Manage clients Manage enrollments My account Help - Español

Log out KMOCIMPL919

My clients

Manage clients

You can add, search, and view client information here. Use the Download template and Upload Client List to manage your clients. [DOWNLOAD IN EXCEL](#)

Search

Within Client name [SEARCH](#)

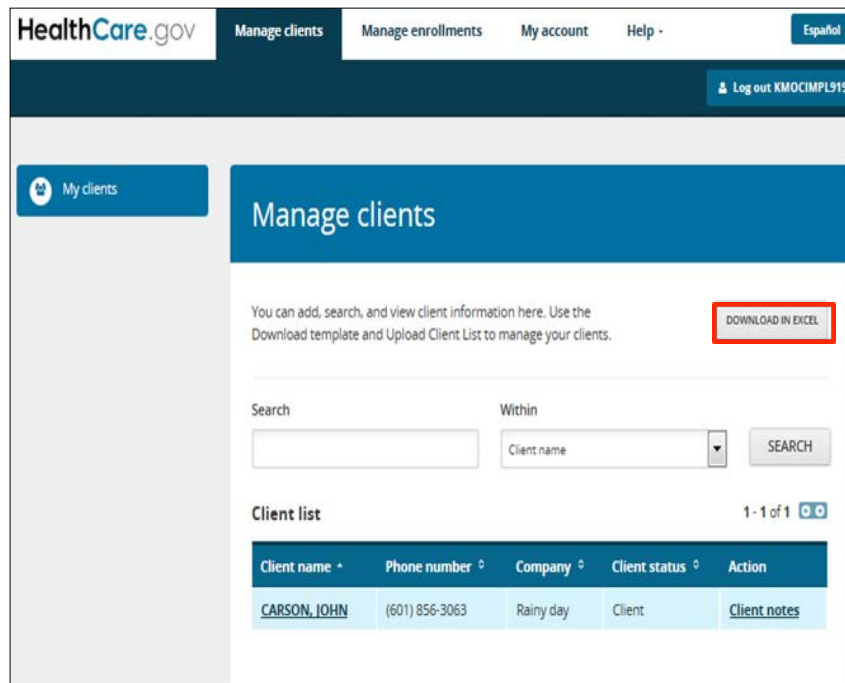
Client list 1 - 1 of 1

Client name	Phone number	Company	Client status	Action
CARSON, JOHN	(601) 856-3063	Rainy day	Client	Client notes

Downloading a client list

On the **Manage clients** page, you can download an authorized list of clients. You have to get authorization from an employer before they can become a client. Once an authorization is requested by an employer, you can log into your account to accept or decline the pending authorization. If you accept the pending authorization, that employer will appear on your client list. You can download a list of existing clients in MS Excel .xls format. To download a list of clients:

- Select the **Manage enrollments** tab. On the **My clients** page, you'll see a list of your clients.
- Select **DOWNLOAD IN EXCEL**. Choose the file you want and confirm.
- After the file downloads you can save it to your computer.



Creating enrollment

You can help with the enrollment process after you've accepted the employer's pending authorization to become your client. The employer must take the first step to request authorization. Once authorized, you can create an enrollment proposal or finish the employer's enrollment application that's already started. **You won't be able to create an enrollment for an employer if the employer doesn't give you authorization.**

To create an enrollment from a saved proposal:

- Select the **Manage enrollments** tab. On the **My clients** page, you'll see a list of your clients.
- Select the **Proposals** link under the **Action** field of the client list for a specific employer. On the **Saved proposals** page, you'll see the saved proposals for the selected employer.
- Select the **View Details** button on the **Saved proposals** screen to see the **View Employer Enrollment Details** page.
- Select **Create enrollment** on the **View Employer Enrollment Details** screen to confirm your selection and return back to the **My clients** page.

HealthCare.gov Manage clients Manage enrollments My account Get assistance ▼ Español

Log out AGENT4TEST0

Client enrollments

Manage client enrollments

Below is a list of clients who have authorized you to act on their behalf.

DOWNLOAD IN EXCEL

Search Within

Client name

SEARCH

1 - 1 of 1

Client list

Client name ^	Phone number ^	Company ^	Employees	Action
Carson, John	(601) 856-3063	123	1	Check eligibility

CLIENT: SUSAN GRIFFITH



Eligibility



Proposals



Enrollment



Manage employees



Employer payment and
billing


Proposals

CREATE PROPOSAL

Proposal sent on 12/12/14 10:16:38 AM

VIEW DETAILS

Health coverage

Plan Name	Total estimated cost	Annual deductibles	Employer's Monthly Share	Employees's Monthly Share
 Group Platinum 1 EPO Platinum	\$132.12	\$150.00 per person \$250.00 per family	\$66.06	\$66.06

Dental coverage

Plan Name	Total estimated cost	Annual deductibles	Employer's Monthly Share	Employees's Monthly Share
 DentaQuest EPO Family Low EPO LOW coverage category	\$19.46	\$100.00 per person \$300.00 per family	\$5.84	\$13.62

Older proposals

- Proposal sent on 11/11/14 10:50:43 AM

CLIENT: SUSAN GRIFFITH



Eligibility



Proposals



Enrollment



Manage employees

Employer payment and
billing

Employer enrollment details

[BACK TO PROPOSAL](#)[PRINT](#)

Enrollment period

Start date

11/11/2014

End date

11/18/2014

Coverage start date

01/01/2015

End coverage on

12/31/2015

Employer's offer of coverage

Employees can accept the health insurance company and plan you selected, or select any plan from the plan category and insurance company below (if applicable).

Health coverage

- Virginia Health 1

Health plan category

- Platinum

Dental coverage

- DentaQuest Virginia, Inc.

Dental plan category

- LOW coverage category

Employer's contribution

Health coverage

Employee coverage

50.0%

Dental coverage

Employee coverage

30.0%

Coverage selected for employees

Employer's contribution

Health coverage

Employee coverage
50.0%

Dental coverage


Employee coverage
30.0%

Coverage selected for employees



Important: It's your responsibility to ensure that all your employees get information about how to enroll in a health plan through SHOP.

Health coverage

INSURANCE CARRIER	Total estimated cost	Annual deductibles	Estimated employer contribution	Estimated employee contribution
 Group Platinum 1 EPO Platinum	\$132.12	\$150.00 per person \$250.00 per family	\$66.06	\$66.06

Dental coverage

INSURANCE CARRIER	Total estimated cost	Annual deductibles	Estimated employer contribution	Estimated employee contribution
 DentaQuest VIRGINIA, INC. DentaQuest EPO Family Low EPO LOW coverage category	\$19.46	\$100.00 per person \$300.00 per family	\$5.84	\$13.62

CREATE ENROLLMENT

Changing an Employer's Authorization Status

If an employer's authorization status is **INACTIVE**, you can update it to **ACTIVE**. If an employer decides not to use your services, the employer's status will automatically update to **INACTIVE**.

To change an employer's authorization status:

- Select the **Manage clients** tab. On the **My clients** page you'll see a list of your clients.
- Select the employer's name under the **Client name** field. On the **Edit client** page, you'll see employer details.
- Select the **CHANGE CLIENT STATUS TO INACTIVE** link. You'll get a confirmation that the employer's status is changed.
- Select **SAVE AND CONTINUE** to see the updates.

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Log out AGENT4TEST0

My clients

Edit client

[BACK TO MANAGE CLIENTS](#)

Status: CLIENT [CHANGE CLIENT STATUS TO INACTIVE](#)

**Required field.*

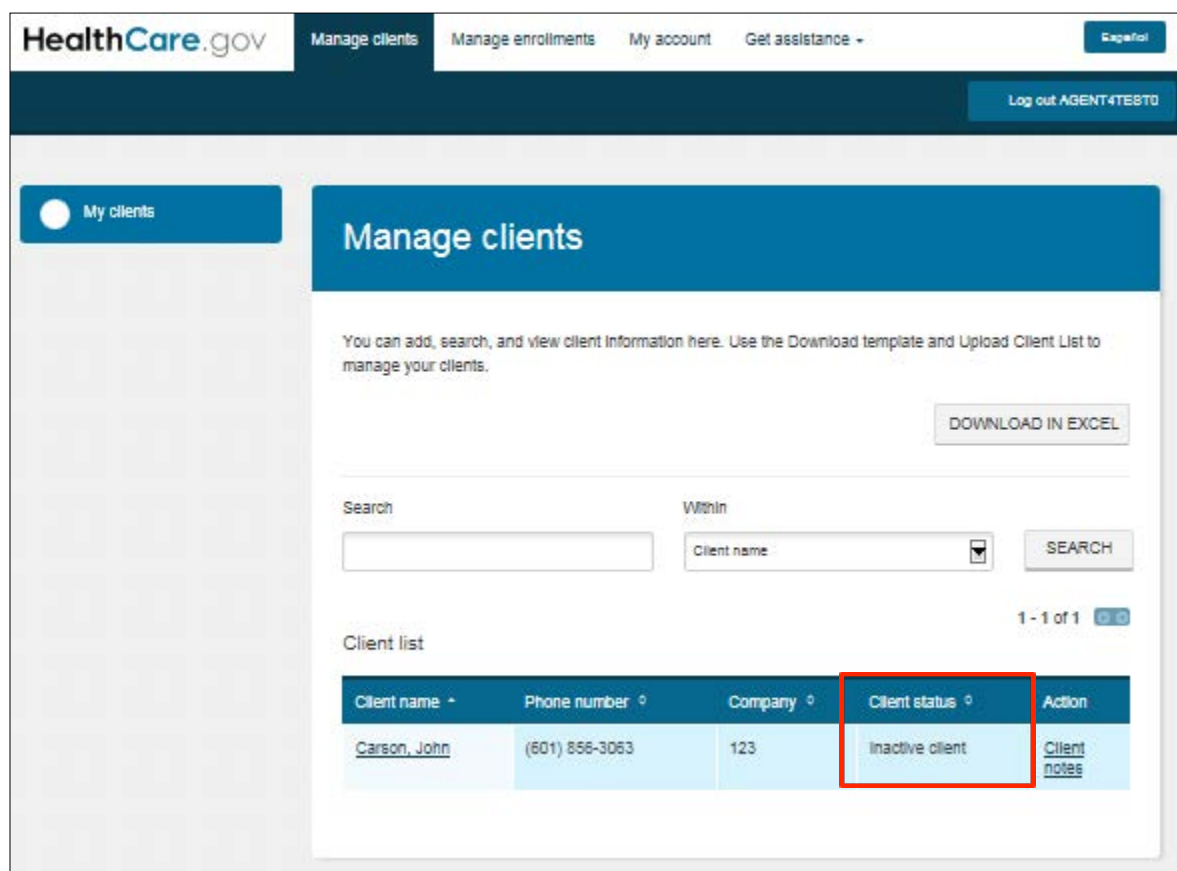
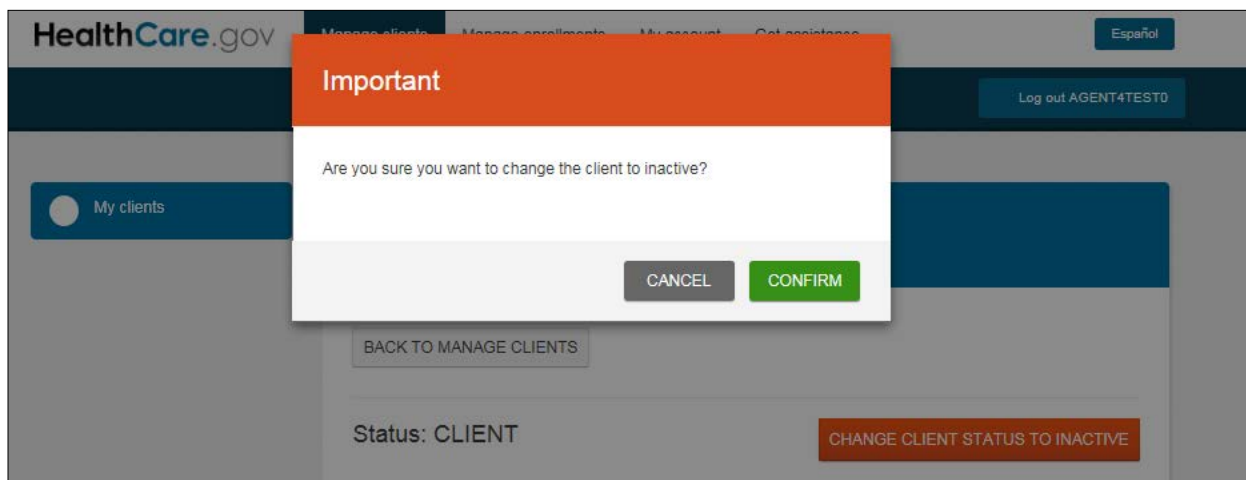
*First name	Middle name	*Last name	Suffix
John		Carson	Suffix ▼

*Business name

123

Primary business address

*Street address	Apt./Ste. #



Editing an employer's information

You can edit an employer's information once you've added the employer as a client. **Remember, employers have to give you authorization before you can help them in the SHOP Marketplace.**

To edit an employer's information:

- Select the **Manage clients** tab. On the **My clients** page, you'll see a list of your clients.
- Select the employer's name under the **Client name** field. On **Edit client** page, you'll see employer details.
- Select **SAVE AND CONTINUE** to confirm the changes.

The screenshot shows the 'Edit client' page. On the left is a sidebar with a 'My clients' tab. The main content area has a blue header 'Edit client' and a 'BACK TO MANAGE CLIENTS' button. Below this, the client's status is 'Client', with a red button to 'CHANGE CLIENT STATUS TO INACTIVE'. The form contains several fields: *First name (JOHN), Middle name (empty), *Last name (CARSON), and Suffix (a dropdown menu). Below these is the *Business name field with 'Rainy day' entered. The 'Primary business address' section includes *Street address (street), Apt./Ste. # (empty), *City (city), *ZIP code (07001), *County (MIDDLESEX, a dropdown menu), and *State (NJ). At the bottom, there are fields for *Phone number, Ext., Second phone, and Ext., all of which are currently empty.

*City

*ZIP code

*County

*State

*Phone number

Ext.

Second phone

Ext.

Email address

Contact preferences

*Preferred method of contact

*Preferred language

CANCEL

SAVE & CONTINUE

HealthCare.gov

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Log out KMOCIMPL919

My clients

Manage clients

You can add, search, and view client information here. Use the Download template and Upload Client List to manage your clients.

DOWNLOAD IN EXCEL

Search

Within

SEARCH

Client list

1 - 1 of 1

Client name	Phone number	Company	Client status	Action
CARSON, JOHN	(601) 856-3063	Rainy day	Client	Client notes

Adding client notes

You can add client notes for any employer that you're working with. To add client notes:

- Select the **Manage clients** tab to see a list of your clients.
- Select the **Client notes** link under the **Action** field of the client list to view the **Client notes** dialog box.
- Select the type of notes to be entered from the **Information type** drop down menu. Enter your comments in the **Comments** text box. Select **SAVE**.

You can follow this same process to review your notes. You'll see saved comments in the **Comments** text box.

The screenshot shows the HealthCare.gov 'Manage clients' interface. At the top, there's a navigation bar with 'HealthCare.gov', 'Manage clients', 'Manage enrollments', 'My account', 'Help', and a 'Log out KMOICIMPL919' button. Below this, a sidebar on the left has a 'My clients' link. The main content area is titled 'Manage clients' and includes a search bar, a 'Within' dropdown menu, and a 'SEARCH' button. Below the search bar, there's a 'Client list' table with one entry for 'CARSON, JOHN'. The table has columns for 'Client name', 'Phone number', 'Company', 'Client status', and 'Action'. The 'Action' column for 'CARSON, JOHN' has a link labeled 'Client notes'.

Client name	Phone number	Company	Client status	Action
CARSON, JOHN	(601) 856-3063	Rainy day	Client	Client notes

HealthCare.gov

Manage clients Manage enrollments My account Get assistance

Español

Log out AGENT4TEST0

My clients

Client notes

*Required field.

*Information type

Follow-up

Comment

CANCEL SAVE

Client list

Client name	Phone number	Company	Client status	Action
Carson, John	(601) 856-3063	123	Client	Client notes

Have questions or need help?

For more information on the SHOP Marketplace, visit [HealthCare.gov/small-businesses](https://www.healthcare.gov/small-businesses).

Or you can contact the SHOP Call Center at 1-800-706-7893, Monday–Friday, 9 a.m.–7 p.m. EST. TTY users should call 711 to reach a call center representative.

If you have questions about the Health Insurance Marketplace, contact the Health Insurance Marketplace Call Center at 1-800-318-2596. TTY users should call 1-855-889-4325.